

CONFIDENTIAL

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ROUTING AND RECORD SHEET**SUBJECT:** (Optional)**PMS & PD FY-86 Objectives****FROM:****EXTENSION****NO.****DATE**

22 Jan 86

TO: (Officer designation, room number, and building)**DATE****OFFICER'S INITIALS****COMMENTS** (Number each comment to show from whom to whom. Draw a line across column after each comment.)**RECEIVED****FORWARDED**

1.

C/PMS/OL

2.

C/PD/OL

3.

4.

5.

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10.

11.

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14.

15.

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22 January 1986

NOTE FOR: Chief, Procurement Management Staff
Chief, Procurement Division

FROM:
Chief, Information & Management Support Staff

SUBJECT: PMS & PD FY-86 Objectives

Bob and Larry:

In our 17 January quarterly review, Hank and John asked that we pass along certain guidance from them pertaining to your FY-86 objectives. I know you've talked with them since then and have agreed to work together on these projects. However, I pass along the following in case any of these were not discussed specifically in your meeting:

a. Directorate-level PMS-2 (inspecting decentralized contracting team transactions). You need to develop a game plan (i.e., who and when) on these inspections.

b. Directorate-level PMS-3 (goals for increasing competitive procurements). Should be "desirable" instead of "nice-to-have."

c. Directorate-level PMS-6 (procurement handbook for the layman). This is the only one of PMS' that is designated as an "image" objective. As you know, Hank had asked for 2 from each division and staff: 1 procedural and 1 communications. Let us know if one of your others is image-related.

d. Directorate-level PD-2 (contract-settlement backlog). Larry, be prepared to discuss at your next bi-weekly.

e. Office-level PMS-1 (cancelling outdated PNs). Remember your Feb milestone to write the PN cancelling the outdated PNs and listing those still in effect.

f. Office-level PD-5 (PD visitation program). Should be "essential" instead of "desirable." This one will be monitored very closely.

g. All PMS & PD objectives. Bob, you and Tom should discuss these at your next bi-weekly.

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FY 86

Desirable

Directorate Level

O/L ~~XXXX~~ Objective

Office: OL/PMS

Objective Statement: ~~XXXXXX~~ procurement handbook for the laymanResponsible Officer:

Significant Funding Amount: \$ _____ FY _____

Quarter Ending: 31 December 1985

O — Scheduled
X — Actual

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Outline of handbook						0						
Preliminary draft									0			
Final draft												0
 for 1st Qtr.												

PMS-6

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FY - 1986

E

Office:

DIRECTORATE LEVEL

Objective Statement:

OL/PROCUREMENT DIVISION

Responsible Officer:

Specialize Contract Officer-Intern Training Program

O — Scheduled

X — Actual

Significant Funding Amount: \$

FY 86

(Funding dependent on number of new EOD's)

Quarter Ending: 31 December 1985

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Prepare and submit final draft of program and schedule to D/OL for approval												
2. Designate training officers for on-the-job training for each new hire entry into program												
3. Establish and maintain close liaison with OT&E external training coordinator regards scheduling C.O.I.T.'s for military schools												
4. Establish automated data base in Wang alliance to schedule and track training of each officer												
5. Conduct quarterly How Goes It sessions between Chief and Deputy Chief, PD and all trainees.												

Note: This MBO is included in the overall review of OL training by selected procurement officers serving on the OL Training Review Committee.

is drafting up some ideas on this subj, but primary driving force will be the OL Tng Cmte. (Per [redacted], 1/8/86)

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FY 8,
Office

Essential

Office: OL/PMS
 Objective Statement: ~~Cancelling Outdated Procurement Notes~~
 Responsible Officer:
 Significant Funding Amount: \$ _____ FY _____
 Quarter Ending: 31 December 1985

O — Scheduled
 X — Actual

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Write Procurement Note cancelling outdated Procurement Notes and listing ones still in effect					0							
Note: This activity scheduled for 1st Qtr.												

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FY - 1986

OFFICE LEVEL

E

Office: OL/PD

Objective Statement: Institute Evening Shift For Clerical Support

Responsible Officer:

Significant Funding Amount: \$ FY 86

Quarter Ending: 31 December 1985

O — Scheduled
X — Actual

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Identify PD requirement for evening shift clerical support including advantages, no. of employees, hours pay, etc.	---	--O	-X									
2. Obtain D/OL approval to hire evening shift clerical support.	---	---	-X									
3. Seek advice from and make arrangements with Personnel to recruit.	---	---		X								
4. Establish evening shift position duties/procedures.	---	---	---	---	---	O						
5. Begin recruitment process.	---	---	---	---	---	O						
6. Interview applicants.	---	---	---	---	---	---	---	O				
7. Select applicants.	---	---	---	---	---	---	---	---	O			
8. Implement evening shift for clerical support.	---	---	---	---	---	---	---	---	---	O		
9. Measure results (i.e.-thruput time of contracts, overtime expended, etc.)	---	---	---	---	---	---	---	---	---	---	---	O
Note: A memorandum requesting D/OL approval was sent to the D/OL in December 1985.												

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Conversation [redacted] 1/8/86:

He just met today [redacted] re putting out vacancy notice for GS-6 part-timers to work 4-6 hrs in the evenings. Will hold off on getting GS-7 supervisor (also part-time) until workers are lined up. Need is becoming more critical w/impending loss of 2 fulltime secys.

This objective is ahead of schedule and will probably be speeded up even more.

FY - 1986

OFFICE LEVEL, .

E

Office: OL/PD

Objective Statement: ~~Prepare Two Days Introduction to PD Training Course~~
Responsible Officer: ~~For Contract Officer Interest~~

O — Scheduled

X — Actual

Significant Funding Amount: \$ N/A FY 86

Quarter Ending: 31 December 1985

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Identify course objectives.	---	XO										
2. Complete draft of course design	---	---	XO									
3. Obtain OT&E Curriculum Committee approval.	---	---	---	---	O							
4. Present Pilot Course	---	---	---	---	---	O						
NOTE: Milestones 1 and 2 completed. Presently identifying specific areas for instructional purposes.												

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FY - 86

OFFICE LEVEL

E

Office: OL/PD & OL/SD (Joint Action)

Objective Statement: Develop Standardization of Equipment & Consolidate

Responsible Officer: Maintenance Contracts Where Feasible

Significant Funding Amount: \$ 86

Quarter Ending: 31 December 1985

O — Scheduled

X — Actual

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Identify current Agency equipment standards, centralized equipment programs & consolidated maintenance systems for modeling.	---	0										
2. Identify vendors with large numbers of Agency contracts.	---	---	0									
3. Identify equipment types in Agency that are purchased/rented in large numbers.	---	---	--0									
4. Recommend contract consolidations where feasible.	---	---	---	--0								
5. Solicit Agency standard requirements from requirements offices.	---	---	---	--0								
6. Urge requirements offices to obtain approvals to create Agency standards (i.e. -from Agency Contracts Review Board, D/OL and Directorate Heads).	---	---	---	---	0							
7. Prepare requests for proposal (RFP'S) for standard items if applicable.	---	---	---	---	---	0						
Note: Vendors with multiple contracts are currently being identified. (See more on reverse side)												

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Note from conversation [redacted] 1/8/86:

#1 is almost finished.

#2 should be completed within next wk or so.

Action is primarily PD's.

On standardization, there're the tradeoffs of timeliness vs. cost. Competition, rather than standardization, seems to result in lower costs.

Consolidation of maintenance contracts is somewhat related to the standardization issue.

I asked Bob if it might be better to separate the two issues.

FY-86
OFFICE LEVEL

D (design)
O — Scheduled
X — Actual

Office: OL/PD
Objective Statement: Implement a Procurement Request Receipt Form to Promote Good Procurement Division Customer Relations
Responsible Officer: [redacted]
Significant Funding Amount: \$ [redacted] FY 86
Quarter Ending:

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Identify items that PD customers need feedback on, including request status, designated procurement officer, documents required of customer, etc.		--0										
2. Design a procurement request receipt form and instructions for use thereof.			-----0									
3. Solicit PD management ideas/approval.						-----0						
4. Solicit concurrence in form design and use from Forms Management Branch.						-----0						
5. Create/print forms.							-----0					
6. Instruct PD personnel on use of form.								-----0				
7. Implement usage of form.									-----0			
8. Solicit feedback from PD customers on form design and use.										-----0		
Note: Action underway on #1 and 2 -- almost completed. And objective will probably be finished ahead of schedule. [redacted] drafted the Receipt Form and is awaiting responses from all PD elements. (Per conversation w/Bob, Y/8/86)												

FY-86
OFFICE LEVEL

E (per 20/L. 1/17/86)
D - (signature)

Office: OL/PD
Objective Statement: Implement a Procurement Division Visitation Program
Responsible Officer:
Significant Funding Amount: \$ _____ FY 86
Quarter Ending:

O — Scheduled
X — Actual

Activities Planned	Quarter 1			Quarter 2			Quarter 3			Quarter 4		
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
1. Compile a list of customer offices to be scheduled for visitation by PD personnel.			-----0									
2. Schedule appointments with offices and procurement teams.			-----0									
3. Compile a visitation schedule for front office review.			-----0									
4. Visit customer offices and collect feedback regarding their successes, failures, problems, etc.												-----0
5. Review information collected concerning PD customer service, resource distribution and problems for possible recommendations for improvement.												-----0
No activities scheduled for 1st Qtr.												

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